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ABSTRACT

This evaluation study of the Educational Opportunities Fund (E.O.F.) was designed to answer eight general questions: (1) to what extent the E.O.F. program has achieved its intended objectives; (2) what byproducts in terms of educational programs, innovations, and so forth the program has produced? (3) how well have the individual E.O.F. projects in school districts have realized their stated objectives; (4) what administrative, fiscal, or other effects have been produced at the school district level by the introduction of the E.O.F. program; (5) how valuable the funding of projects is on the basis of proposals as compared with the formula financing; (6) what the specific changes in E.O.F. program policies and procedures are which would improve the quality and long-term productivity of the projects; (7) how well E.O.F. (Compensatory) has realized its stated objectives; and, (8) needs assessment regarding the secondary component to E.O.F.--what the perceived needs, if any, of clients relative to a secondary component are; if positive, what the nature, scope, and modality should be. The data sources on which this report is based are interviews and an analyses of documents. A structured interview schedule was used for the 337 interviews. Persons interviewed included central and regional personnel, board members, teachers, principals, parents, and others. (Author/JM)

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An Evaluation of the Educational Opportunities Fund

A Report to

the Minister of Education

Province of Alberta

prepared by

A.MacKay

Department of Elementary Education

The University of Alberta

UD 016554

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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OCTOBER, 1975

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The Research Director wishes to thank Messrs. *D. Boughton*, *Swee-Hin Toh*, *R. Mahen*, *J. Ilavsky*, *J. Simms* and *D. Wilson*, who served as members of the research team.

To the E.O.F. officials, particularly *Mr. C. Meek* and to *Dr. J. Hrabi*, Associate Deputy Minister of Education must go thanks for their co-operation. The administrators in regional offices, school districts and schools, the hundred of teachers, parents and others who participated in the study should also be commended.

Finally, to *Miss Shirley Culic* who typed the final manuscript and who played a key role in the day-to-day operation of the project, a word of special thanks.

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Chapter I

Introduction and Overview

In August of 1974 the Research Director [*A.MacKay*] was asked by the Alberta Department of Education to design an evaluation of the *Educational Opportunities Fund* [E.O.F.]. A contract covering the time period of September 1st, 1974 to November 30, 1975 was signed between the Minister of Education and the Governors of *The University of Alberta* on January 29th, 1975. Under the terms of this contract, eight general questions were identified for the study. They were as follows:

[1] To what extent has the E.O.F. program achieved its intended objectives?

[2] What by-products in terms of educational programs, innovations, etc., has the program produced?

[3] How well have the individual E.O.F. projects in school districts realized their stated objectives?

[4] What administrative, fiscal, or other effects have been produced at the school district level, by the introduction of the E.O.F. program?

[5] How valuable is the funding of projects on the basis of proposals as compared with formula financing?

[6] What are the specific changes in E.O.F. program policies and procedures which would improve the quality and long-term productivity of the projects?

[7] How well has E.O.F. (*Compensatory*) realized its stated objectives?

[8] Needs assessment re secondary component to E.O.F. What are the perceived needs, if any, of clients relative to a secondary component? If positive, what should be the nature, scope and modality?

During the time period September 1, 1974 to May 1, 1975 work on the project was focussed on design of the study, collection of documents, and preparation of the research team and the data collection instruments. In May, June, July and August members of the research team were in the field collecting data and, later, analyzing the data that had been collected.

Originally the evaluation design included three major data sources: *interviews*, a *questionnaire survey*, and a *document analysis*. However, after the interviews were completed and a preliminary analysis of the data obtained from the interviews was complete the Department of Education and the Research Director agreed that the questionnaire survey would be deleted from the study. Therefore, the two data sources on which this report is based are the *interviews* and the *analysis of documents*.

The Research Team

The research team was comprised of two sub-units one of which conducted the interviews and site visits and another which analyzed documents obtained from the E.O.F. office in the Department of Education, Edmonton.

Interview and Site Visit Team. Messrs. *Robert Mahen*, *Douglas Boughton*, and *Jeremy Simms* carried out the interviews and site visits. Mr. Mahen was a Ph.D. candidate in Curriculum Studies in the Department of Elementary Education, while Messrs. Boughton and Simms were Ph.D. students in the Department of Secondary Education.

Document Analysis Team. Messrs. *John Ilavsky*, *Swee-Hin Toh* and *Donald Wilson* carried out the analysis of documents. Messrs. Ilavsky and Toh were Ph.D. candidates in the Department of Educational Administration while Mr. Wilson was a Ph.D. candidate in the Department of Secondary Education.

At one stage in the evaluation design, the Research Director proposed to employ a *Project Administrator*; but as the time available became short it was decided that the day to day administrative arrangements could most conveniently be handled by the Research Director and members of the research team. Miss Shirley Culic, Department Secretary in the Department of Elementary Education

played a key role in the administrative aspects of the operation.

As a footnote it can be said that availability of human resources is a severely limiting feature in an enterprise of this type. One has to, inevitably, rely on people who have other full-time commitments as graduate students or professors. In this instance, it was fortunate that some well-qualified and dedicated people were able to give some of their time to work on the project. The need for some agency to have people on a stand-by capacity for projects such as this one was made evident by this particular experience.

The Evaluation Design

As mentioned above, the sources of data were: (a) *interviews* and *site visits*, and, (b) *analysis of documents*. The interviews and site visits were, of course, the major source of data and Chapters II - IX inclusive of this report provide the findings. In Chapter X, the document analysis is described in terms of scope, techniques of analysis, and results. Therefore, the design details in this first chapter will deal only with the interview and site visit sample and procedures.

The Sample

In Table I, the sample of persons interviewed is described. Table II contains a breakdown of the project distribution in the "*population*" of EOF projects and describes the sample chosen for interviews and visits. In Table III, the identification of types of projects in the sample and some information as to location, rural vs urban, and size is provided.

Table 1

Persons Interviewed

Central Office	59
Regional Office	4
Board Members	24
Teachers	130
Principals	69
Parents	46
Other	5
TOTAL	337

Table II

Three Year EOP Projects - Population and Sample

Zone	Locale	Number of Projects			Interviewed			File Search*			Sampled		
		Public	Separate	Total	Public	Separate	Total	Public	Separate	Total	Public	Separate	Total
1	urban	2	2	4	1	1	2	1	-	1	2(100)	2(50)	3(75)
	rural	14	10	23	2	1	3	2	3	5	4(28.6)	4(40)	8(34.8)
	Total	16	12	27	3	2	5	3	3	6	6(37.5)	5(41.7)	11(40.7)
2	urban	6	4	10	5	1	6	-	1	1	5(83.3)	2(50)	7(70)
	rural	38	3	41	3	-	3	10	-	10	13(34.2)	-	13(31.7)
	Total	44	7	51	8	1	9	10	1	11	18(40.9)	2(28.6)	20(39.2)
3	urban	-	-	-	-	-	-	-	-	-	-	-	-
	rural	74	10	84	7	2	9	15	3	18	22(29.7)	5(50)	27
	Total	74	10	84	7	2	9	15	3	18	22(29.7)	5(50)	27(32.1)
4	urban	14	2	16	1	-	1	2	1	3	3(21.4)	1(50)	4(25)
	rural	46	2	48	4	1	5	12	-	12	16(34.8)	1(50)	17(35.4)
	Total	60	4	64	5	1	6	14	1	15	19(31.7)	2(50)	21(32.8)
5	urban	41	3	44	6	2	8	8	-	8	14(34.1)	2(66.7)	16(3[illegible].4)
	rural	20	3	23	2	-	2	5	1	6	7(35)	1(33.3)	8(34.8)
	Total	61	6	67	8	2	10	13	1	14	21(34.4)	3(50)	24(35.8)
6	urban	8	7	15	3	1	4	1	1	2	4(50)	2(28.6)	6(40)
	rural	64	9	73	3	1	4	15	2	17	18(28.1)	3(33.3)	21(28.8)
	Total	72	16	88	6	2	8	16	3	19	[illegible]2(30.6)	5(31.2)	27(30.7)
Prov.	urban	71	18	89	16	5	21	12	3	15	[illegible]8(39.4)	8(44.4)	36(40.4)
	rural	256	37	292	21	5	26	59	9	67	80(31.2)	14(37.8)	94(32.2)
	Total	327	55	382	37(11.3)	10(18.2)	47(12.3)	71	12	83	108(33.0)	22(40)	130(34.0)

[*] - Tentatively Selected

Table III

Analysis of Project Types, Location and Size [Indicated by Cost]

Project Types	No.	Zones	Rural	Urban	Size (by Cost)	
Communications	2	5,1	1	1	11,5	Project Size
Communications/Media	1	1		1	4	Code.
Field Trips	1	2		1	3	1-< 1,000
Fine Arts	3	5,5,2	1	2	14,3,2	2- 1- 5,000
Fine Arts/Phys Ed.	1	6		1	3	3- 5- 10,000
Fine Arts/Field Trips	1	6	1		3	4- 10- 20,000
Language Arts	9	6,6,5,4,3, 3,2,2,1	4	5	22,19,16,13, 4,4,4,3,3	5- 20- 30,000
Language Arts/Reading	7	6,5,5,4,3, 1,1	6	1	13,11,10,9, 9,6,3	6- 30- 40,000
Language Arts/Reading/Library	1	2		1	5	7- 40- 50,000
Language Arts/Reading/Music	1	3	1		5	8- 50- 60,000
Language Arts/Reading/Special Ed.	1	3	1		7	9- 60- 70,000
Mathematics	1	5		1	13	10- 70- 80,000
Mathematics/Science	2	3,2	1	1	13,3	11- 80- 90,000
Math/Science/Outdoor Ed.	1	4	1		4	12- 90- 100,000
Math/Science/Lge Arts/Reading	1	4		1	4	13-100- 200,000
Math/Science/Social Studies	1	2	1		13	14-200- 300,000
Reading	4	3,3,3,1	4		13,9,5,3	15-300- 400,000
Science	1	5		1	4	16-400- 500,000
Social Studies	1	4	1		8	17-500- 600,000
Others - Guidance	1	2		1	5	18-600- 700,000
- Integrated Curriculum	1	4	1		12	19-700- 800,000
- Staff Differentiation	1	5		1	15	20-800- 900,000
- Learning Centre	1	5		1	9	21-900-1,000,000
- Community Resources	1	6		1	6	22-> 1,000,000
- Early Ed/Readiness	1	6	1		13	
- Oral French	1	6	1		4	
TOTALS	47	Z1: 6 / Z2: 8 / Z3: 9 / Z4: 6 / Z5: 10 / Z6: 8	26	21	Projects Viewed in each Zone.	

The Interview Schedule

A structured interview schedule was used for the 337 interviews. Because of some differences in perspective among the various sub-groups, there was some variation in the questions asked. The interview schedule is in Appendix A of this report and the different questions for sub-groups in the sample are shown on the different versions of page 4 of the schedule.

In each case the interview was planned to last from 30 - 50 minutes. The interviewers took a bit of time to explain their role to the subjects and to assure them of complete anonymity. At the end of each day's work in the field, the researchers summarized their interview schedule data and observational data obtained at the project sites. After all of the interviews had been completed the research group spent a considerable amount of time back at the University campus developing a system for summarizing and analyzing the contents of the interviews.

There were a great many different types of responses to the fairly open-ended questions in the schedule, and as leads to new information appeared, the researchers probed into interesting areas of inquiry. While the end result was, in the Research Director's opinion, much more valuable than data from a structured questionnaire survey, the task of content analysis became rather monumental.

In reporting the findings from this phase of the study, the *response types* developed during the content analysis will be used as the framework for reporting. In each case the percentage of respondents who answered in a particular way is reported and this quantitative information is used as a basis for drawing conclusions. While this kind of analysis depends on rather arbitrary "*rules of thumb*", it does enable a researcher to avoid reliance on general impressions, interviewer bias, and so on.

In other words, the content analysis of data obtained from face-to-face, probing, open-ended interviewing produces a level of [illegible]or which justifies the conclusions drawn from the study.

The summary sheets and the original interview protocols are not included

in the report simply because they are so minute in detail that they do not readily provide information to a reader. However, they are stored at the University and will not be destroyed until after the final report has been received by the Minister of Education.

Overview of the Report

This report is comprised of eleven chapters. Chapter I provides an introduction, description of the study, and an overview. Chapters II - IX inclusive provide the findings on the eight general questions. Chapter X includes the description and the results of the document analysis and Chapter XI summarizes the conclusions and includes a set of recommendations.

Chapters I and XI are designed to serve as a short version of the report for ready communication to readers who do not want to deal in great detail with the basic data. Therefore, besides the official 12 copies of the full report, the Research Director has prepared 12 copies entitled "A Summary of An Evaluation of E.O.F."

Chapter II

Achievement of Intended Objectives of EOF Program

Only a small number of the people interviewed had a clear picture of the objectives as listed in EOF documents. In general, there was a positive response to the question regarding achievement of objectives. Mastery of basic skills was ranked highest while enhancement of pupils' self-confidence was second highest of the specific objectives identified by the respondents. In order to provide a more detailed picture of the responses and of the level of response by certain categories of persons interviewed, the following sections of this chapter will present *ten* categories or types of responses which the research team developed from their field notes and interview schedules. In each case, the response type will be presented and then information regarding the strength of support for that response will be provided. The *response types* in some cases represent verbatim statements by individuals. In most cases, however, they are intended to represent statements which varied somewhat in wording but which contained essentially the same information.

In this chapter and in subsequent chapters of the report, the response type will have adjacent to it a statement as to the frequency of its appearance in the sample of interviews. In order to summarize the response frequencies, an arbitrary rule was used, as follows:

1. *If 61% to 100% of interviewees made the response, it is labelled High.*
2. *If 31% to 60% of interviewees made the response, it is labelled Medium.*
3. *If 1% to 30% of interviewees made the response, it is labelled Low.*

Following the presentation of each set of response types a *discussion* of the data in terms of its significance for the study and some information regarding subgroups of respondents will be presented. It should be noted that, although the number of people making a particular response was low in some cases, there was an additive or composite effect insofar as we were able to group *positive* responses which focussed on different facets of the same central question.

Responses

[1] (a) The objectives of the EOF program have generally been achieved [*High*]

(b) The objectives have been achieved in a limited way [*Low*]

(c) The objectives have been achieved because they are so broad it would be difficult not to achieve them [*Low*]

(d) The objectives have probably been achieved [*Low*]

Discussion

All categories of people interviewed had a *medium* or *high* frequency response of the type identified as [1] (a). The school board members and central office staff were in the *medium* category (53% and 59% respectively) while principals, classroom teachers and project teachers were in the *high* frequency category. No notable differences between rural and urban respondents or among respondents in the six zones of the province were evident.

It was clear that the strong support for this particular [1 (a)] response type represents an endorsation of the EOF program.

[2] Objective *one* (*"mastery of basic and auxiliary skills"*) has been:

(a) well achieved [*Medium*]

(b) most visible [*Low*]

(c) not well achieved [*Low*]

(d) difficult to measure [*Low*]

Discussion

The only notable deviation from the general picture shown above was on the part of school board members who mentioned response type 2 (a) in only 29% of the cases.

The over-all frequency of mention of 2 (a) was 45% which suggests that, in the minds of the people interviewed, the evidence is not yet available that would enable them to provide stronger support. The fact that the projects had not yet run their full course and that product evaluation evidence was not always available may explain the *medium* frequency level.

[3] Objective *two* ("*maintaining or increasing self-confidence and self-respect*") has been:

(a) well achieved [*Medium*]

(b) most visible [*Low*]

(c) not well achieved [*Low*]

(d) least visible [*Low*]

Discussion

Central office personnel and project teachers in rural areas were generally stronger than their urban counterparts in supporting response 3 (a). In fact, 75% of the project teachers in rural areas made that particular response while only 38% of the urban project teachers responded in this way. No obvious explanation for the difference can be provided at this time. The fact that the total response was in the *Medium* category suggests that evidence on the achievement of this objective is not yet well developed at the project level. Again, a possible need for product evaluation may be indicated.

[4] Objective *three* ("*visibility of upgrading activities*") has been:

(a) well achieved [*Low*]

(b) most visible [*Low*]

(c) not well achieved [*Low*]

(d) least visible [*Low*]

(e) too early to say [*Low*]

Discussion

The only deviation from the general response picture was on the part of project teachers in urban areas who indicated, at a *Medium* frequency level, that this specific objective was well achieved. This is not surprising in view of the probability that special projects as an aspect of "*upgrading activities*" are new to many rural settings because of scarcity of funds. In Zone #3, in particular, this response was quite evident.

[5] Evaluator's (i.e. research team member) observation of link between needs served by project and program goals. [*Medium*]

Discussion

Because the research team actually visited the sites of the projects as well as interviewing various people, it was possible for them to make their own judgment as to the congruence between the needs served by each project and the goals of the EOF program as stated in program documentation.

The observation was particularly well supported by the evidence available from rural projects. As a commentary on the degree to which project goals are compatible with general program goals these observations are especially significant.

[6] Instructional services are being:

(a) Directly delivered to students [*High*]

(b) Indirectly delivered to students [*Low*]

Discussion

Across all categories response type 6 (a) was mentioned by 74% of the respondents. The detailed breakdown of responses was, in part, as follows:

Rural board members	*70%*
Urban board members	*14%*
Central office personnel	*56%*
Rural principals	*90%*
Urban principals	*82%*
Rural classroom teachers	*100%*
Urban classroom teachers	*64%*
Project teachers	*77%*
Parents	*78%*

The only major deviation from the general trend was on the part of urban board members who did not mention response type 6 (a) to the same extent as other respondents. One should note, however, that when their (i.e. urban board members') responses to 6 (a) and 6 (b) are combined the total response is 28%. Moreover, one should not infer from a *low* frequency response that *negative* conclusions should be drawn. In spite of this caution, the deviation is interesting and is, perhaps, worthy of future study.

One can certainly say on the basis of these responses that there is strong evidence to support a conclusion that services are being delivered to elementary students by EOF projects.

[7] (a) Instructional assistance is being delivered to teachers [*High*]

(b) Instructional assistance is *not* being delivered to teachers [*Low*]

(c) Assume it must deliver instructional assistance to teachers [*Low*]

Discussion

In total, 70% of the respondents mentioned response type 7 (a). Classroom teachers (91%), principals (86%), rural board members (80%) and project teachers in urban areas (75%) were particularly high in this category. Again, one of the major objectives of the EOF program appears to have been achieved. This finding coupled with the information about direct impact on pupils supports a conclusion that the program has been effective.

[8] Achievement of the objectives of specific projects has been limited by:

(a) Teachers not using available services [*Low*]

(b) Amount of money available for specific projects [*Low*]

(c) Unwillingness of teachers to participate [*Low*]

(d) Doubts about longevity of program [*Low*]

(e) Lack of expertise in program writing [*Low*]

Discussion

These particular response types were not frequently mentioned by respondents in any of the categories. In the minds of the people interviewed, limitations on the achievement of project objectives were not significant. Given that the projects were funded for a limited time period, the *low* frequency of mention of response type 8 (d) (i.e. "*doubts about longevity of program*") is significant.

[9] The stated objectives in the EOF documents are not unique. They are general goals of education. Earmarking implies:

(a) Insufficiency of general funding [*Low*]

(b) Poor administration [*Low*]

(c) Poor teaching performance for a variety of reasons [*Low*]

Discussion

A very low percentage of responses indicated *negative* views about earmarked funding. Only 6% of school board members interviewed responded in each of the three types listed above. One conclusion can be drawn that funding of this type is not considered bad in principle.

[10] Parental involvement in the EOF program has been:

(a) non-existant [*Medium*]

(b) limited [*Medium*]

(c) extensive [*Low*]

(d) increased [*Low*]

Discussion

The responses shown above were general across all categories of respondents (including parents). Rural classroom teachers (73%) were particularly strong in mentioning response 10 (a). Rural parents and urban principals did report some *increase* in parental involvement.

It can be concluded that the parental involvement goal of the EOF program was not realized.

Conclusions

[1] THE OBJECTIVES OF THE *EOF PROGRAM* HAVE GENERALLY BEEN ACHIEVED.

[2] MASTERY OF BASIC AND AUXILIARY SKILLS HAS BEEN MODERATELY ACHIEVED.

[3] MAINTENANCE OR INCREASE IN PUPILS' SELF-CONFIDENCE AND SELF-RESPECT HAS BEEN MODERATELY ACHIEVED.

[4] VISIBILITY OF UPGRADING ACTIVITIES IS GENERALLY LOW.

[5] THERE IS A MODERATELY STRONG CONNECTION BETWEEN PROJECT OBJECTIVES AND *EOF PROGRAM* GOALS.

[6] INSTRUCTIONAL SERVICES ARE DEFINITELY BEING DELIVERED DIRECTLY TO STUDENTS.

[7] INSTRUCTIONAL ASSISTANCE IS BEING DELIVERED TO TEACHERS.

[8] ACHIEVEMENT OF PROJECT OBJECTIVES IS NOT APPARENTLY BEING LIMITED BY VARIABLES IDENTIFIED BY THE PROJECT PARTICIPANTS OR OTHER RESPONDENTS.

[9] THE CONCEPT OF SPECIAL FUNDING DOES NOT HAVE NEGATIVE CONNOTATIONS.

[10] PARENTAL INVOLVEMENT IN *EOF* PROJECTS IS GENERALLY LOW.

Chapter III

By-Products of EOF

The Research Director believes that an evaluative study is not complete unless questions are asked about the by-products (*both positive and negative*) of the program being evaluated. In this case, the information obtained from respondents proved to be very valuable as a basis for drawing conclusions about EOF. In the previous chapter it was clear that the basic objectives conceived of by the designers of EOF have been generally achieved. The information in this chapter attempts to tell the rest of the story which, in some ways, is more important as a basis for evaluation. Because this second general question was the most open-ended one of all, a great many different responses were elicited. It was in dealing with this second question that the content analysis approach proved to be of greatest use.

Responses

[1] (a) EOF has produced a re-assessment, by teachers, schools, and systems, of the state of education [*Low*]

(b) Others are demanding the service [*Low*]

(c) A desire to expand this program has been created [*Low*]

Discussion

As in the case in most response types generated by this second question, the actual number of respondents who made a particular comment is quite low. Therefore one should not infer that a low percentage of responses of a particular type suggests lack of positive reactions. Each response type should rather be viewed as one facet of a generally highly positive view of the by-products of EOF. In this particular case, the comments speak for themselves and are quite positive in direction.

[2] EOF has stimulated professional growth in school district personnel:

(a) through project initiated in-service programs [*Low*]

(b) by specific program activities [*Low*]

(c) by individual project activities [*Low*]

(d) through course work, professional involvement, etc. [*Low*]

Discussion

Once again the number of times each of these responses was made is low; but a scrutiny of the detailed data shows that principals (36%) and teachers (24%) mentioned response 2 (a) fairly often.

[3] The nature of professional growth mentioned above includes:

(a) growing awareness of the potential value of the roles of para-professionals, aides, and parent volunteers in education [*Low*]

(b) growth of knowledge and transferable instructional skills in content areas [*Medium*]

(c) teacher commitment to specific programs [*Low*]

(d) growth in ability of teachers to generate new ideas aimed at dealing with specific educational needs of elementary students [*Low*]

(e) realization of the educational advantages of small group work [*Low*]

(f) growth in ability of teachers to deal with specific educational problems of elementary students [*Low*]

(g) sensitization of teachers to alternatives with respect to:

(i) curriculum [*Low*]

(ii) methodology [*Low*]

(iii) materials and equipment [*Low*]

(iv) organization of curriculum materials [*Low*]

(h) growth in ability to identify individual student needs [*Low*]

(i) growth of administrative skills in some school district administrators [*Low*]

Discussion

Response type 3 (b) was mentioned frequently by principals (58%), classroom teachers (73%) and project teachers (61%). Response 3 (d) was mentioned fairly frequently by board members (47%) and central office personnel (51%). Response 3 (f) was mentioned by 65% of central office people and by 50% of the principals in the sample. Responses 3 (g) (i, ii, iii) were mentioned by classroom and project teachers fairly frequently. Response 3 (h) was mentioned by 38% of rural central office personnel, 36% of rural principals, 65% of rural classroom teachers and 39% of the project teachers.

[4] EOF has engendered the following insights:

(a) of school district personnel into the administrative structure of education [*Low*]

(b) of school district personnel into the benefits arising from requirements to develop proposals for special grants [*Low*]

(c) of teachers and administrators into the benefits derived from clarifying educational objectives [*Low*]

(d) of parents into the problems of educating elementary students [*Low*]

(e) realization that adequate services require full-time, not part-time personnel [*Low*]

(f) realization that children can take more responsibility for their educational program [*Low*]

Discussion

Responses by parents emphasized the comment represented by response type 4 (d) as 83% of rural parents and 85% of urban parents mentioned the insights

they had gained into the problems of educating elementary pupils. The other respondents all offered these comments as indications of positive side effects.

[5] EOF has allowed school district personnel to initiate projects (and, consequently, convince boards of their worth) which otherwise were viewed as too expensive. Some of these projects are being continued on board initiative. [*Low*]

Discussion

This response was made by 43% of urban principals and by 30% of rural board members. It is one of the numerous comments elicited by our question about by-products which seemed particularly worthy of note as positive evidence about the program's effects.

[6] EOF has improved the quantity and quality of communications at specified levels (e.g. teachers sharing ideas with other teachers, etc.). [*Medium*]

Discussion

An examination of the detailed breakdown of responses of this type shows the following:

Rural board members	*40%*
Central office personnel	*85%*
Rural classroom teachers	*78%*
Rural parents	*50%*
Urban parents	*80%*

The response was common across all six zones of the province and is suggestive of a discrepancy that must characterize the work style of many teachers who are not involved with project or other team work in the elementary schools of Alberta. As a positive side-benefit, this is another one which is particularly striking.

[7] (a) EOF has produced growth in evaluative skills of school district personnel [*Low*]

[7] (b) EOF has produced a growth in awareness of the need for evaluation in education [*Low*]

Discussion

Rural board members (40%) and 39% of central office personnel mentioned response 7 (a). In appraising this response one needs to take account of the analysis contained in Chapter X of this report before drawing any hard and fast conclusions about the state of the art of evaluation.

[8] (a) EOF has stimulated local curriculum development [*Low*]

(b) EOF has stimulated curriculum development to meet local (and individual) needs [*Low*]

(c) EOF has stimulated curriculum development demonstrating new approaches (e.g. classroom teacher initiated production of materials) [*Low*]

Discussion

Urban central office personnel (35%), classroom teachers (37%) and project teachers (39%) mentioned response 8 (b) moderately frequently. Some 39% of central office people mentioned response 8 (c). There is some support, therefore, for a conclusion that curriculum development has been enhanced.

[9] EOF has produced positive changes in:

(a) Staff (i) attitude [*Medium*]
(ii) morale [*Low*]

(b) Student (i) attitude [*Medium*]
(ii) morale [*Low*]

Discussion

Favorable effects on staff and student attitude were generally perceived by the respondents. In particular, classroom teachers felt that teacher and

student attitude had been positively affected (58% and 61% respectively). Project teachers also felt that teacher and student attitude had been improved. Some 83% of rural parents and 35% of urban parents felt that pupils' attitudes had been improved as a result of EOF projects.

[10] EOF has produced positive community reaction. [*Medium*]

Discussion

All categories of respondents, except for school board members, mentioned this response fairly frequently. Rural board members (30%) did mention it somewhat frequently. As a "*political*" side-benefit, this one is extremely noteworthy.

[11] Remediation delivered to students under EOF produced benefits in other areas. [*Low*]

Discussion

Parents made this response fairly frequently, particularly the parents in rural locations (33%).

[12] EOF has saved administrative time. [*Low*]

Discussion

Some school principals and a few classroom teachers made this response. No board members or central office personnel mentioned it.

[13] Minor, project-specific problems such as:

(a) difficulties experienced by new teachers entering a locally generated project [*Low*]

(b) resistance of some teachers to new programs [*Low*]

(c) loss of student time in other areas when receiving remediation [*Low*]

(d) stigma felt by students receiving remediation [*Low*]

(e) jealousies and uncharacteristic behavior of some students [*Low*]

(f) staff jealousies of apparent light load of remedial teachers [*Low*]

(g) tendency for teachers to "*off-load*" problem students onto remedial personnel [*Low*]

(h) established precedent of released time for teachers to attend workshops [*Low*]

(i) resentment by teachers because of additional paperwork involved [*Low*]

(j) skepticism about the value of central office experts [*Low*]

(k) frustration produced through limitations imposed by EOF program guideline about expenditures for materials [*Low*]

Discussion

The only notable exception to the pattern of *low* frequencies of these response types was with respect to 13 (d) (stigma effect) where 33% of project teachers in rural areas mentioned this as a problem.

[14] The proliferation of special fund programs such as EOF each with its own criteria and guidelines has caused increased demands on administrative time and energy. With respect to EOF:

(a) the output was worth it [*Low*]

(b) the output was ***not*** worth it [*Low*]

(c) the demand was only in the initial stages [*Low*]

Discussion

Although the frequency of response 14 (a) was only 29% for the whole sample,

there was a higher frequency of response for some key subgroups:

School board members	*41%*
Rural central office	*77%*
Rural principals	*46%*
Urban principals	*50%*
Rural classroom teachers	*61%*
Total rural sample	*37%*

Response 14 (c) was mentioned by 43% of urban board members, 38% of rural central office people and 32% of rural school principals. Response type 14 (b) was mentioned by no board members and by only 5% and 2% of central office and school principals respectively.

Conclusions

[1] THERE IS FAIRLY STRONG EVIDENCE TO SUGGEST THAT *EOF* HAS PRODUCED THE FOLLOWING BY-PRODUCTS:

(a) *growth of knowledge and transferable skills of teachers.*

(b) *parental insights into the problems of educating elementary children.*

(c) *board member support for projects which would otherwise have not been supported.*

(d) *increased communication among professionals.*

(e) *improved staff and student attitudes.*

(f) *positive community reaction.*

(g) *administrative demands were worth the effort in view of the output.*

(h) *apparent stigma effect for some rural pupils.*

[2] THERE IS TENTATIVE SUPPORT FOR A CONCLUSION THAT *EOE* HAD THE FOLLOWING BY-PRODUCTS:

(a) *increased professional growth of teachers.*

(b) *increased teacher sensitivity to alternatives.*

(c) *increased teacher ability to identify individual student needs.*

(d) *increased evaluative skills of school district personnel.*

(e) *stimulated local curriculum development activities.*

Chapter IV

Achievement of Intended Objectives of Individual Projects

One of the most difficult problems to be dealt with during the design of this evaluation was caused by the sheer scope of the program. There were approximately 500 individual projects in operation during 1974-75 representing many different subject areas and involving large numbers of professionals and pupils. A thorough evaluation of any *one* of the 500 projects would have required a full scale design and the work of a fully staffed evaluation team. Such an approach was not at all feasible given the time-line for the evaluation as well as the limits in availability of human resources for evaluation. Therefore, a deliberate decision was made to limit the evaluation to a sample of projects which, it could be argued, would represent the total list of projects although not selected in a particularly rigorous way. That sample of projects is described in the tables included in Chapter I of this report. Our site visits and interviews enabled us to produce some "*surface*" answers to this question. In no way did we purport to carry out thorough evaluations; rather, we relied on the opinions of knowledgeable people and on our own judgments as to evidence for or against the success of projects. As a passing comment, one can suggest that there exists in Alberta a strong need for increasing the availability of evaluation skills. More will be said of this in later chapters of the report; for the moment, the comment is made as part of the background to this particular set of findings.

Responses

[1] Confident "*Yes*" with strong evidence. [*Medium*]

Discussion

Response frequencies, except for board members, were *Medium* or *High* for all categories of respondents. Not surprising was the fact that project teachers in rural (67%) and urban (58%) schools were confident that the projects had been

successful. Parents (47%), regular teachers (35%), principals (42%) and central office people (37%) were also positive in their assessments. The evidence here was quite clearly in support of the effectiveness of the sample of projects examined by the research team.

[2] Confident "*Yes*" with questionable evidence. [*Low*]

Discussion

Only the parent group made this response frequently. This was particularly so in rural areas where 50% of the parents made a positive statement. The essential difference between this response and response type [1] above is that the persons interviewed were not able to satisfy the research team that good evidence was available in this second case.

In general, these responses add support to the positive finding reported under [1] above.

[3] Confident "*Yes*" with little or no evidence. [*Low*]

Discussion

Again, the research team was not satisfied, in this case, that adequate evidence had been offered to support any positive comments.

[4] Cautious "*Yes*" with admitted (or obviously to research team) limited evidence. [*Low*]

Discussion

Rural board members (30%) made this comment fairly often.

[5] (a) "*Yes*" with unstated limitations [*Low*]
(b) "*Yes*" but limited; all aims not achieved [*Low*]
(c) "*Yes*" but limited; not all students benefitting [*Low*]

[5] (d) "*Yes*" but limited; aims not achieved [*Low*]

(e) "*Yes*" but in a limited way because not all teachers are cooperating in the program [*Low*]

(f) "*Yes*" but lack of money is restricting fullest possible achievement of objectives [*Low*]

(g) "*Yes*" however greatest results limited to the lower grades [*Low*]

(h) "*Yes*" but not all projects are achieving their objectives [*Low*]

(i) "*Yes*" but limited by inefficient organization and/or administration at the local level [*Low*]

(j) "*Yes*" but limited by staff turnover [*Low*]

Discussion

Taken together, these 10 response types are positive support for the effectiveness of the projects--modified by certain constraints in the situation. Project teachers, particularly in rural areas (67%) frequently made a response similar to 5 (f), i.e. "*lack of money is restricting full achievement.*"

[6] Not familiar enough with projects to respond. [*Low*]

Discussion

Very few people made this comment. It may be inferred, therefore, that in the light of the generally positive assessment reported earlier in this chapter, people are able to make a decision about effectiveness of projects even though they have been operating for only a relatively short time.

Conclusions

[1] INDIVIDUAL PROJECTS SUPPORTED BY *EOF* GRANTS ARE SEEN AS GENERALLY SUCCESSFUL.

[2] THERE IS SOME DIVERSITY IN THE AMOUNT AND QUALITY OF EVALUATIVE EVIDENCE AVAILABLE TO SUPPORT THE VIEW THAT THE PROJECTS ARE EFFECTIVE.

[3] THERE WERE NO NEGATIVE RESPONSES TO THIS QUESTION (i.e. PROJECT SUCCESS?) FROM ANY OF THE PEOPLE INTERVIEWED.

Chapter V

Effects on Administrative and Other School District Factors

The fourth general question contained in the terms of reference for the study was intended to enable respondents to talk about fiscal, administrative, and other effects at the school district level. In some respects this question overlaps with the question about by-products of EOF [Chapter III]. However, it seemed worthwhile to enable the people in our sample to offer comments about "*administrative*" as well as "*educational*" side-effects.

Responses

[1] Disproportionate use of administrative time in dealing with "*red tape*". (Neglect of other administrative duties). [*Low*]

Discussion

Although the over-all frequency of this type of response was *Low*, some details merit reporting here:

Rural board members	*60%*
Urban board members	*43%*
Rural central office	*52%*
Urban central office	*50%*
Rural principals	*41%*
Urban principals	*36%*

Administrators and board members clearly saw problems in this regard. An examination across *zones* of the province showed that people in Zones 1 and 4 made this comment more frequently than people in the other four zones. It can be concluded that local administrative time had to be used to obtain and manage the funds.

[2] Difficulties produced in staffing EOF projects. (Staffing pressure was increased by delays in approving projects and also by an apparent shortage of some types of specialists). [*Low*]

Discussion

Coupled with the belief that there was an oversupply of teachers in Alberta at about the time that EOF projects commenced, this finding is not surprising. One would want to obtain additional data, however, before concluding that specialists were indeed available in sufficient numbers even given the *low* frequency (30%) of this response.

[3] Increase in administrative load through:

(a) short lead time [*Low*]

(b) changes requested in proposals [*Low*]

(c) increase in staffing pressure [*Low*]

(d) other administrative staff being partly relieved of regular duties to deal with [*Low*]

(e) need to clarify roles because of additional people in schools (paraprofessionals, volunteers, etc.) [*Low*]

Discussion

Rural central office personnel (86%) frequently made a response similar to 3 (c). This was particulary the case in Zone 1 where 100% of the people interviewed (central office and school board members) made this comment. In general, however, the frequency of comments of the types outlined above was *low*. Those who made the comments were *emphatic* in their statements; but their numbers are low.

[4] (a) Anxiety and pressure produced by delays in approval [*Low*]

(b) Anxiety and pressure produced by uncertainty about future of program [*Low*]

Discussion

Urban central office personnel (35%) mentioned response 4 (b) fairly frequently. In Zone 4, 43% of the urban subjects mentioned response 4 (a). Both of these responses suggest *some* anxiety and concern regarding administrative effects; but no extensive concerns were evident.

[5] (a) Frustrations produced by non-field-tested guidelines for EOF [*Low*]

(b) Frustrations produced by "*triviality*" of changes requested in proposals [*Low*]

(c) Frustrations produced by evaluation efforts [*Low*]

(d) Frustrations produced by lack of communication about what is going on elsewhere [*Low*]

(e) Short lead time made for fragmented programs [*Low*]

(f) Frustrations produced by limited time made available to teachers to prepare for new programs [*Low*]

(g) Frustrations produced through inability to re-allocate funds [*Low*]

Discussion

An examination of the detailed analysis of this set of responses showed that the frequency of response was generally low across all subgroups with one exception. Response 5 (a) ("*non-tested guidelines*") was mentioned fairly frequently by rural (38%) and urban (40%) central office personnel.

[6] Generation of local suspicion of the motives of the government:

(a) Attempt to gain partial control of local funds [*Low*]

(b) Attempt to initiate special projects (then pulling out) leaving local areas to "*pick up the tab*" [*Low*]

(c) Some resentment that a bureaucracy of non-functional consultants is being created [*Low*]

Discussion

In general, these responses were made by only a few of the people interviewed. There seemed to be no widespread suspicion of the motives of government in launching the EOF program.

[7] Produced minor administrative difficulties (e.g. timetabling, etc.). [*Low*]

Discussion

This response was made by a few principals, project teachers and central office people; but no widespread reaction was apparent.

[8] Skill in the art of grantsmanship was developed in school districts. [*Low*]

Discussion

A few board members and central office personnel mentioned this as an outcome of the EOF program. Otherwise, this response was not often made.

[9] EOF 3-year projects militate against long-range planning in school districts. [*Low*]

Discussion

A few people in each category of respondents made this type of comment; but there was no general reaction to this effect.

[10] EOF stimulated more positive use of specialist consultant's time. [*Low*]

Discussion

Central office personnel and principals were the only respondents to make this type of remark.

[11] Pressure to get EOF money has caused a "*casting around*" for projects at the

(a) school level [*Low*]

(b) district level [*Low*]

Discussion

A small number of principals offered response 11 (a) while a number of board members (rural members 30%) and central office people mentioned 11 (b). One can infer that this effect was not perceived to be widespread.

[12] Primary needs were not attended to in "*top down*" model of proposal development. [*Low*]

Discussion

A few central office people and school principals made this comment.

[13] Administrative communications have been improved by EOF. [*Low*]

Discussion

Rural project teachers (33%) were the only group to mention this response fairly frequently.

[14] (a) EOF programs are becoming increasingly more expensive for local districts to run. Anxieties are produced because of difficulties in determining costs each year. [*Low*]

[14] (b) EOF has involved parents much more in budget decisions. [*Low*]

Discussion

No parents made response 14 (b). Some board members (rural members 30%) and central office personnel made response 14 (a).

[15] Difficulties in dealing with the inflation factor were experienced. EOF funds do not adequately cover this problem. Consequently, some programs are threatened. Projects using paper materials experience problems because of rapidly increasing costs of paper. Smaller rural districts expressed difficulty in financial planning. [*Low*]

Discussion

Rural project teachers (58%) made this type of response fairly often. Over-all, this comment was made by 12% of the total sample. There was, in other words, some isolated concern for inflation.

[16] Difficulties with accounting were experienced. (e.g. 3 financial years per project overlaid on to conventional fiscal year). [*Low*]

Discussion

A few central office people, principals and teachers mentioned this as an effect of EOF. But no strong reaction was evident.

[17] EOF has involved more people in educational decision-making (decentralization). [*Low*]

Discussion

A few principals and classroom teachers made this comment. No parents or board members referred to this by-product. It should be noted that this

and other comments described in this chapter may overlap somewhat with responses obtained to our general research question number two.

Conclusions

[1] FOR SOME SUB-GROUPS, PARTICULARLY BOARD MEMBERS AND ADMINISTRATORS, THERE WAS A DISPROPORTIONATE AMOUNT OF ADMINISTRATIVE TIME USED BY *EOF* ACTIVITIES.

[2] STAFFING OF PROJECTS WAS NOT PERCEIVED TO BE A DIFFICULTY.

[3] RURAL CENTRAL OFFICE PERSONNEL REPORTED AN INCREASE IN ADMINISTRATIVE WORK LOAD.

[4] SOME ANXIETY AND CONCERN OVER ADMINISTRATIVE SIDE-EFFECTS WAS EVIDENT.

[5] CENTRAL OFFICE PEOPLE HAD SOME CONCERN ABOUT THE GUIDELINES FOR *EOF*.

[6] THERE WAS NO SUSPICION OF HIDDEN MOTIVES ON THE PART OF GOVERNMENT.

[7] RURAL PROJECT TEACHERS WERE CONCERNED ABOUT INFLATION IN COSTS, PARTICULARLY OF PAPER MATERIALS.

Chapter VI

Project Funding as Compared with Formula Financing

The question of special earmarked funding versus "*traditional*" financial grant formulas is a difficult one to deal with in any absolute terms. About all that one could expect to do in a study of this type was to obtain the opinions of people who had been involved, in some way, with EOF. There are advantages and disadvantages associated with earmarked funding when it is examined from a theoretical point of view. In a given practical case, one may have to place heavy reliance on the opinion of participants in funded programs. If a participatory model of educational planning is seen as important, then evidence of the sort presented in this chapter can be very significant.

Responses

[1] Project funding is preferred because funds are protected from manipulation (e.g. local budget shifts, A.T.A. negotiations, etc.). [*Medium*]

Discussion

A detailed breakdown of results across categories shows:

Rural board members	*40%*
Urban board members	*43%*
Rural central office	*52%*
Urban central office	*35%*
Rural principals	*55%*
Rural classroom teachers	*44%*
Rural project teachers	*67%*

Across all zones of the province (except Zone 5) the totals showed a *medium* response frequency of this type. Clearly, the notion of protecting the funds was supported by many of the persons interviewed.

[2] Some of the stimulating effects of special funding include: *sharpening of educational perspectives, encouraging creativity in teachers, encouraging experimentation, obtaining commitment from teachers, encouraging board to increase attention to special needs of district pupils.* [*Low*]

Discussion

Only in Zone #1 was there a moderately frequent occurrence of this response. Again, one should note that the *low* frequencies do not at all imply a *negative* view; but rather, the absence of a strong, positive view.

[3] EOF has made possible projects that otherwise would never have received board approval. [*Low*]

Discussion

Although the frequency of this and other particular responses is *low*, one must look at the composite picture in order to make a judgment.

[4] Funding by proposals (in a "*grass roots*" model) has allowed schools to determine and deal with educational problems at the local level. [*Low*]

Discussion

This comment was made by parents and principals in particular.

[5] Department of Education criteria for assessing educational need are more objective; therefore, projects are likely to be more wisely funded than if decision-making occurred at the local level. [*Low*]

Discussion

Only scattered comments of this type were made. Interestingly enough, some school board and central office personnel did make this type of response.

[6] Proposal funding represents a "*bonus*" of readily accessible funds otherwise unavailable through the foundation program. [*Low*]

Discussion

Some principals, regular classroom teachers, project teachers and parents made this response. No board members or central office people mentioned it.

[7] Formula funding is superior to proposal funding because:

(a) It eliminates time consuming and costly "*red tape*" problems [*Low*]

(b) It allows autonomy and flexibility [*Low*]

(c) Criteria for assessing need are more appropriate at district level [*Low*]

Discussion

Some of the detailed breakdown of responses may be worth looking at even though the over-all response rate was *low*.

7 (a)	*School board members*	*12%*
	Central office	*17%*
	Project teachers	*9%*
7 (b)	*Rural board members*	*40%*
	Central office	*10%*
	Classroom teachers	*0%*
7 (c)	*Board members*	*6%*
	Central office	*7%*
	Project teachers	*11%*

These response types are representative of the fairly small number which favored formula financing to project funding.

[8] EOF funds only get to schools or districts with expertise in proposal writing. [*Low*]

Discussion

Only 3% of the total sample made this type of comment.

[9] It doesn't matter which scheme for funding is used--the rules for funding should be such that needs are met and that it doesn't cost a great deal of money to get the funds. [*Low*]

Discussion

This infrequent comment is similar in tone to some of those made in response to the question about administrative side-effects.

Conclusions

[1] PROJECT FUNDING PROTECTS PROGRAMS FROM MANIPULATION OF BUDGETS BY ADMINISTRATION AND/OR SCHOOL BOARDS.

Chapter VII

Recommended Changes in Programs

Any evaluation of a relatively new program should attend to the question of program improvement. The literature on educational evaluation contains many references to the term "*formative evaluation*". This is the use of evaluative data to provide a basis for improving programs as opposed to making decisions about termination or continuation.

In this study, the sixth general question was used to elicit suggestions for improvement. All of the recommended changes are worthy of note even though the percentage of responses was *low* in many cases.

Responses

[1] Reduce red tape. [*Low*]

Discussion

An examination of the categories of respondents shows:

Rural board members	*50%*
Urban board members	*86%*
Rural central office	*33%*
Urban central office	*40%*
Rural principals	*32%*
Urban principals	*36%*

It can be concluded that a "*significant*" number of people at the administrative level in school districts felt that "*red tape*" was a problem in some general way.

[2] Increase flexibility, yet retain earmarking. [*Low*]

Discussion

All urban board members and 51% of central office personnel made this

type of remark. In some ways, this response type is related to the question dealt with in the previous chapter on project versus formula funding.

[3] Plan for a more realistic inflation factor. [Low]

Discussion

Very few people made this type of comment. What *"more realistic"* would be was not forthcoming from the people who did comment in this way.

[4] Expand the program, i.e. increase the amount of money available to elementary schools. [Low]

Discussion

Urban classroom teachers (38%), and rural project teachers (33%) made this comment moderately frequently. How much money would be sufficient to satisfy the need they expressed is difficult or impossible to say.

[5] Facilitate the flow of money to schools by

(a) revising approval procedures such that receipt of money is not contingent upon possession of expertise in proposal writing [Low]

(b) providing a *"roving"* proposal writer or increase liaison with, and administrative assistance, from the regional offices [Low]

(c) providing in-service work in proposal writing, evaluation, and curriculum building [Low]

(d) providing a more structured format for proposals [Low]

(e) eliminating triviality of proposal changes requested [Low]

(f) providing more information on how to get funding [Low]

(g) providing money more often than twice a year [Low]

(h) having a local EOF contact person to deal with [Low]

Discussion

The responses outlined above were, in the main, from board members, central office people, and principals. They amount to a summation of small points to which various participants addressed their attention. How serious in an absolute sense the perceived problems are is a matter of conjecture at this time.

[6] Clarify the guidelines by

(a) defining the nature of the administrative model to be used [*Low*]

(b) specifying a decentralized model [*Low*]

(c) providing more clearly defined criteria [*Low*]

Discussion

Again, the response frequencies were *Low*; but the intent of the responses was to provide government with advice that might be used to improve this or similar programs.

[7] (a) Relax guidelines with respect to materials [*Low*]

(b) Relax guidelines with respect to travel monies [*Low*]

Discussion

Only a few people made these two types of response.

[8] (a) Eliminate red tape by building EOF grants into existing foundation fund [*Low*]

(b) Establish a separate fund for continuance of on-going programs and another for new programs [*Low*]

Discussion

Response 8 (a) clearly overlapped with our prior question regarding

formula versus project funding. Some board members, central office people and project teachers made this kind of statement.

[9] Increase lead time in future programs. [*Low*]

Discussion

While the frequency of mention of this notion was *Low*, those who said it did so with a good deal of emphasis.

[10] Remove necessity for school board to approve projects. [*Low*]

Discussion

No board members; but a few central office personnel and principals made this comment. It relates, in different ways, to the question of local autonomy versus central, i.e. provincial, control.

[11] Provide money for administrative costs. [*Low*]

Discussion

In an earlier chapter, it was indicated that some respondents saw increased administrative costs as an effect of the program. However, only a small number of people focussed on this type of recommendation when they were asked to suggest changes in the program. It may be inferred that, having stated the problem to our research team, they felt that enough had been said to provide a basis for change.

[12] Improve the quality of

(a) External evaluation [*Low*]

(b) Internal evaluation [*Low*]

Discussion

It was somewhat surprising, given the fact that our research team was

itself iden[illegible] with an evaluation project, that a small percentage of people mentione[illegible]s area of possible improvement.

[13] Ensure consistency of administrative action by leaving the final decision about project approval to a single individual. [*Low*]

Discussion

All responses of this type came from central office people. It may reflect a fairly simplistic view about efficiency of decision-making.

[14] (a) Have an oral presentation as well as a written proposal [*Low*]

(b) Have the provincial agency act as an arbitrator if a school board turns down a project which the school thinks is worthwhile [*Low*]

Discussion

A few school principals made these types of response. Nevertheless, the procedures implied by these comments should be looked at as possible features of this or similar programs. Certainly, response 14 (b) is weighted somewhat against local control if "*local*" means school district; but in favor of local control if "*local*" means school.

Conclusions

[1] THE GOVERNMENT SHOULD CONSIDER THE IMPLICATIONS OF MAKING THE FOLLOWING CHANGES IN *EOF* PROCEDURES:

(a) *reduce "red tape".*

(b) *increase flexibility.*

(c) *increase the amount of money per pupil.*

(d) *provide assistance in proposal writing.*

(e) *increase lead time for similar programs in the future.*

Chapter VIII

EOF (Compensatory)

Although the implementation of EOF (Compensatory) was still in its early stages, the Department of Education wanted to begin to explore its effectiveness. Our research team found that many of the people interviewed felt that they knew too little about the Compensatory program and that they would prefer not to comment at all. However, there were some respondents who, in the judgment of our team, were knowledgeable about the Compensatory program and whose opinions were recorded. In this chapter, the percentages of responses are based on the number of people who had knowledge of EOF (Compensatory) rather than on the total sample of respondents. This has the effect of highlighting the comments which were made relatively frequently and seems to be justified because of the relative lack of knowledge about the Compensatory component of EOF

Responses

[1] (a) Too early to tell [*Low*]

(b) Successful but restricted in the sense that not enough children with real need qualify for help [*Low*]

Discussion

An examination of the details of responses of the 1 (b) type shows

Rural board members	*50%*
Central office personnel	*31%*
Urban principals	*100%*
Rural classroom teachers	*50%*
Urban classroom teachers	*100%*

There was, clearly, concern about the effectiveness of the program in delivering services to children with needs.

[2] Program has improved students'

(a) self-image [*Low*]

(b) motivation [*Low*]

(c) breadth of experience [*Low*]

Discussion

No evidence seems to be available yet to enable respondents to comment about the specific effects of Compensatory programs. Given their state of implementation, this is not surprising.

[3] (a) Red tape is too restrictive. That is, many eligible students are denied necessary help because district personnel have difficulty constructing a satisfactory proposal or because of the restrictive nature of the guidelines [*High*]

(b) The "*geographic*" guideline is inadequate and/or unrealistic [*Medium*]

(c) The guidelines are unclear or inappropriate and should be re-examined [*Medium*]

Discussion

The comments cited above provide a fairly firm basis for the conclusion that the guidelines for Compensatory programs should be carefully re-examined by the Department with the view of streamlining them as much as possible.

[4] (a) An undesirable "*labelling*" effect accompanies Compensatory monies. Associated with this is the politically sensitive requirement of proving an area to be "*disadvantaged*" in order to qualify for assistance [*Low*]

(b) Unnecessary duplication of effort through gathering data which are already available from accessible sources [*Low*]

Discussion

Urban central office personnel (50%) and classroom teachers (33%) made response 4 (a) moderately frequently. The few people who made response type

4 (b) were highly emphatic.

[5] Time is lost because of red tape. [*Low*]

Discussion

Classroom teachers (67%) were concerned about this matter. Again, it relates to some of our other findings about administrative costs.

[6] Jealousies are produced because of friction between eligible and ineligible districts. [*Low*]

Discussion

Urban school principals (33%) referred to this political matter.

[7] There are some difficulties in staffing Compensatory programs. [*Low*]

Discussion

The frequency of this type of comment is as low as the frequency of a similar comment about staffing the Elementary component of EOF.

Conclusions

[1] *EOF* [COMPENSATORY] IS AT AN EARLY STAGE OF IMPLEMENTATION AND EVALUATION MUST BE QUITE TENTATIVE.

[2] THE GUIDELINES SHOULD BE RE-EXAMINED BY THE DEPARTMENT.

Chapter IX

Need for Project Funding for Secondary Schools

In addition to the evaluation of the EOF program, the Department of Education asked for a needs assessment regarding a possible extension of project funding into secondary schools. There was, indeed, a fair measure of support for the idea of introducing a secondary component provided always that elementary schools would continue to enjoy the special support provided by the existing grants. In other words, people whom we interviewed felt that EOF had partially offset the "*disadvantages*" suffered by elementary schools because of patterns of prices and school district budgets, which were perceived to favor secondary schools. People in our sample were worried that an EOF (Secondary) component might simply restore the perceived imbalance. However, as long as the elementary components would not suffer, there was no "*dog in the manger*" attitude evident.

Responses

[1] (a) Yes [*Low*]

(b) Yes; but if there is a choice as to where the additional funds should go it should be to elementary. That is, money spent here may reduce the present need at the secondary level. [*Low*]

(c) Yes, although there is greater payoff from money spent on elementary schooling. [*Low*]

Discussion

Principals (32%), rural classroom teachers (35%), and project teachers (31%) made response type 1 (b) moderately frequently. While the response frequencies were *low*, they were clearly favorable.

[2] (a) Yes, particularly at the junior high level. [*Low*]

(b) Yes, for alternatives to existing programs. [*Low*]

[2] (c) Yes, though timetabling problems at the secondary level may limit the flexibility of programs. [*Low*]

Discussion

Urban board members (57%) and rural project teachers (33%) made the response 2 (a) fairly often.

[3] (a) Extra money is needed at both elementary and secondary levels. [*Low*]

(b) The regular formula funding should be equalized first. [*Low*]

Discussion

Response 3 (b) suggests that people assume that the grants structure dictates budgeting and expenditures in school districts. Perhaps administrators and board members should be reminded that the weighting of per pupil grants does not imply in itself a weighting of budgetary expenditures in favor of secondary pupils.

[4] Yes, as long as nothing is taken away from the elementary funds. [*Low*]

Discussion

This comment is somewhat redundant with others reported in this chapter; but it does focus on another facet of the general response set.

[5] Remedial programs such as those ongoing at the elementary level should continue at the secondary level. [*Low*]

Discussion

Although the frequency of this response was *low*, it is suggestive of one of the types of programs which might be encouraged at the secondary level.

[6] (a) Yes, the needs are probably greater at the secondary level--although different. [*Low*]

(b) Yes, although the focus would be different. [*Low*]

Discussion

These two response types simply indicate the need to provide a different focus should a secondary component be established.

[7] (a) No, the money should go only to elementary. [*Low*]

(b) No. [*Low*]

Discussion

Only 7% of those interviewed made an absolutely negative comment about the idea of extending special funding to the secondary schools.

Conclusions

[1] THE GOVERNMENT SHOULD SERIOUSLY CONSIDER EXTENDING *EOF* INTO THE SECONDARY SCHOOLS.

[2] IF A SECONDARY COMPONENT IS ESTABLISHED, IT SHOULD FOCUS SOMEWHAT ON THE CONTINUANCE OF REMEDIAL PROGRAMS AS WELL AS ON UNIQUELY SECONDARY SCHOOL PROGRAM AREAS.

Chapter X

Analysis of EOF Documents

Besides the interviews and site visits, the evaluation design called for an analysis of a sample of documents obtained from EOF files in the Department of Education. This analysis was undertaken in order to cross-check the information obtained from the other phases of the study and, also, to provide some additional information. In this chapter, the sample of projects on which the document analysis was conducted, will be provided. The scheme for analysis is provided in Appendix B of this report; but the format for reporting the data in this chapter will embody a fairly complete outline of the framework which was used.

Description of Sample for Document Analysis

1. All projects which had been selected for the interviews and site visits (47) (see Chapter I for details of sample) where the criteria had been:

   (a) Distribution by zone (approximately proportional)
   - urban and rural proportions
   - public and separate
   - categories of subject area

   (b) Size of grant made available
   - *all* of the most expensive projects
   - *very few* of the least expensive projects
   - a somewhat representative selection from categories within the middle range

   (c) All of the projects highlighted in the EOF newsletter

2. An additional 31 projects, using the same criteria as in 1 (above), plus several projects which had been mentioned by people during the interviews. These had been perceived to be exciting and successful or to have failed for some reason (n=1).

The Format for Analysis

In Appendix B, a copy of the form which was used by the research team is provided. This format was used on the total sample of 78 EOF project files. It, as will become evident in the following sections of this chapter, includes straightforward information about the availability and content of data in the files; but also includes, in some cases, an evaluative judgment as to the *quality* of content.

The headings and numbers used in reporting the data in the main body of this chapter are those provided on the document entitled "Analysis of Project Documents." (Appendix B).

The data will be reported under each heading and then the discussion of the findings and conclusions will be provided.

I. Criteria Associated with the Proposal

1. *Funding level and level of project implementation in sample of 78 projects.*

		Funding Level ($)						
		≤ 1,000	1,000-5,000	5,000-10,000	10,000-25,000	25,000-100,000	100,000-200,000	200,000 +
Level of Implementation	District (36)	0	0	2	3	18	9	4
	School (41)	1	8	12	12	8	0	0
	Classroom(2)	2	0	0	0	0	0	0
	79*	3	8	14	15	26	9	4

* - One project had dual emphasis hence n = 79 instead of 78

2. *Funding emphasis.*

	a	b	c	d	e	f	g
Major Emphasis	14	10	23	26	28	3	13
Minor Emphasis	12	0	9	2	7	1	1
	26	10	32	28	35	4	14

Code: (a) *in-service education of teachers*
(b) *additional classroom teachers*
(c) *non-clerical aides to support teachers*
(d) *specialist services related to classroom teacher*
(e) *materials for classroom teacher*
(f) *administrative/coordinating/planning services*
(g) *other*

Frequency of number of different purposes cited in proposal documents

No. of Purposes	No. of Projects
1	31
2	26
3	18
4	3

Discussion

1. Many projects (47 out of 78) emphasized more than one object of expenditure for the realization of objectives.

2. Only categories "b" and "f" above constitute expenditures which might be challenged under the original EOF guidelines; some potential for abuse of funds occurs under "c" above (See I-8c and possibly II-3c for use of aides as clerical personnel or perhaps other abuse).

3. The general impression is that budget submissions tended to reflect the guidelines established for EOF.

3. *Rationale for program*

Present	76
Absent	2
Clear	66
Ambiguous	10

Discussion

The program rationale was almost always present and was clear in a substantial majority of cases.

4. *Objectives for program*

[Stated	77	
[Unstated	1	
[General	37]	Many projects had both general
[Specific	55]	and specific objectives
[Vague	10	
[Clear	68	

Discussion

The statements of program objectives were generally clear and were present in all but one of the cases examined.

5. *Description of program* (Consistent with objectives)

Yes	73
No	-
Debatable	5

Discussion

Usually this material was requested by EOF office when it gave conditional approval or asked for more information (e.g. activities planned, nature of role of aides, etc.). The projects were quite adequate on this criterion.

6. (a) *Program budget*

Yes 74

No -

Debatable 3 [Probably missing from files since EOF office was generally strict about budget description]

(b) *Budget for evaluation*

Total Project Budgets	% of Proposal Budget for Evaluation					
	0	$0 < X \leq 1$	$1 < X \leq 2$	$2 < X \leq 5$	$X > 5$	
$\leq$ 10,000	20	0	0	2	2	24
10,000 - 25,000	10	4	0	3	1	18
25,000 - 50,000	5	1	2	3	1	12
50,000 - 100,000	6	0	2	4	0	12
100,000 - 200,000	3	2	2	1	0	8
200,000 +	1	3	0	0	0	3
	45	10	6	13	4	78

Discussion

1. The total budget of the 78 projects surveyed was $4,686,500.00. Total proposed for evaluation in budget submissions was $39,360.00. This represents less than 1% of the total budget requests.

2. Well over half of the projects showed no budgeted expenditures for evaluation.

3. Over two-thirds of the projects budgeted less than 1% of their budgets for evaluation.

4. Only a handful of projects budgeted for evaluation costs of over $2,000.00. NOTE: It may be that evaluation costs were borne locally.

7. *Evidence provided of*

(a) Parent Support

Yes	46
No	32

(b) Teacher Support

Yes	57
No	21

(c) Community Support

Yes	32
No	46

Mechanisms for Parent Support

Parent-staff committee	*[4]*
Parent steering committee	*[3]*
Home and School Association	*[5]*
Parent surveys	*[10]*
Letters of support	*[3]*
Public meetings	*[2]*
Parent-teacher interviews	*[4]*
Solicited parental involvement in program (Aides, etc.)	*[8]*
Post facto support (project existed before EOF)	*[6]*
Parent identified program activities	*[1]*

Mechanisms for Teacher Support

Parent-staff committee	*[4]*
Planning and development of program	*[21]*
Teacher identified problems	*[5]*
Staff meetings	*[7]*
Teacher surveys	*[6]*
Task Force	*[1]*
Post facto	*[1]*
Consulted by administration	*[3]*

Mechanisms for Community Support

County school committees	*[1]*
Inclusion in school committee	*[1]*
Community meetings	*[2]*
Individual volunteers	*[3]*
Public and private agencies and organizations (including Univ./ Colleges 5, YMCA, RCMP, ATA, AGT)	
	[13]

N.B. (i) Usually no evidence was provided of survey results. In addition, when parents or the community are cited as having participated formally or informally, the scope of support is not clear; e.g. one or two parents may be counted as support. Since EOF guidelines did specify description of such support, the results above may be over-estimating actual support.

(ii) The evidence also suggests that schools and districts may have interpreted the notion of "*support*" as involvement in the program during implementation (e.g. parents or community members as aides, volunteers or resource persons) rather than as involvement during development of the proposals.

(iii) In one or two instances, evidence was provided of student involvement in program planning. This was most striking in an outdoor education project where some half-dozen student committees were set up to plan for the field trips.

Discussion

The level of parent and/or community support is not as strong as might have been expected--given the EOF guidelines. However, there were numerous rather interesting mechanisms for developing contacts between the school and its environment.

8. *First draft of proposal received*:

(a) Approval (19)
Conditional approval (54)
More information required (6)

(b) Where conditional or more information required, follow-up is:

Documented (50)
Undocumented (8)

(c) Criteria relaxed

Yes (15)
No (60)
Ambiguous (2)

Discussion

The correspondence between school/district and EOF office clearly indicated a strong concern on the part of EOF to ensure adherence to the guidelines among all projects. Where criteria were relaxed, the action was taken only after considerable deliberation by EOF as justifiable under the circumstances. Some types of criteria-relaxation were:

- *money provided for food supplies owing to poverty of the community*
- *emphasis not on direct classroom delivery [2]*
- *small amounts allocated to secretarial/clerical assistance [4]*
- *supplies and equipment exceeded 50% of budget [3]*
- *money allowed for administrative/coordinative services [1]*

In general, the application of criteria was well-handled by EOF office.

9. *Appeals*

This proved to be a useless categorization. No data are reported.

10. *Evaluation design components proposed*

Frequency with which a specific component appeared

a	b	c	d	e	f	g	None	Mixed
50	47	36	48	15	32	23	6	1

Code:
(a) *academic achievement*
(b) *student attitude/opinion survey*
(c) *pre-post*
(d) *teacher attitude/opinion survey*
(e) *administrator attitude/opinion survey*
(f) *parent attitude/opinion survey*
(g) *other*

Frequency of the number of components per proposal

No. of Components	1	2	3	4	5	6
No. of Proposals	4	16	12	19	14	6

Discussion

1. At least six (a, b, c, d, f, and g) different evaluation components appeared frequently in the project proposals.

2. The average number of components appearing in the proposals was 3.5, indicating an intention to conduct varied, if not extensive, evaluation.

3. Given the emphasis placed on evaluation in the EOF guidelines, the appearance of several evaluation components in project proposals may reflect that emphasis.

4. With the apparently high commitment to evaluation expressed in the

proposals, the question of whether these evaluations were actually conducted and the nature of evaluation activity became important. (See II - 4c, 5a, b, c and 6).

5. It is perhaps speculative; but the failure of 6 proposals to provide any kind of evaluation design might be evidence of relaxation of criteria by EOF office.

In general, the plans for evaluation were present and were fairly comprehensive. However, given the budget allocations and other evidence available to the research team, the implementation capability is open to question.

II. Criteria Associated with Evaluation

1. *Needs assessment*

(a) Outcomes, objectives identified

Yes	(74)
No	(4)

(b) Adequate description of current state

Yes	(48)
No	(24)
Can't say	(6)

(c) Research studies cited

Yes	(30)
No	(43)
Ambiguous	(5)

Discussion

1. A description of the current state was deemed inadequate if nothing more than the statement of the problem is given in one or two sentences. An adequate description is one which delineated in some detail the antecedents of the problem on which the project is based. (e.g. school norms of achievement compared with local or provincial norms).

2. Research studies cited included research literature and local research studies conducted usually by central or regional office personnel and, in one or two instances, as part of community-wide needs assessment studies. Clearly, a majority of the projects analyzed gave no indication of being research based.

2. *Program planning*

(a) Program outlined (See I (5 & 6)

Yes	(78)
No	(0)

(b) Probable success in meeting objectives

Stated	(40)
Inferred	(34)
Unclear	(8)

(c) Success supported by

Professional judgment	(70)
Research evidence	(14)
Unclear	(8)

Discussion

The weak research base in the program planning stage was as evident as it was in the needs assessment stage. The quality of program planning evaluation seems to have been based primarily on professional judgment rather than evidence from the research and/or evaluation literature. Given the fact that evaluation of these projects, themselves, was not well financed, one wonders about the basis for decision-making on program content. One may conclude that educational research did not have a high degree of impact on these projects.

3. *Implementation process*

(a) Program carried out as planned

Yes	(64)	
No	(0)	
Modified	(11)	
Unknown	(6)	[Usually meant no monitoring or progress reports were in files at time of analysis]

(b) Nature of evidence supplied for *implementation* of program

- *field office reports only [25]*
- *self-reports only [36]*
- *both field office and self-reports [13]*
- *no reports at all [4]*

(c) Difficulties reported on:

Inputs

- *weaknesses/difficulties in teacher/aide in-service [6]*
- *staff turnover [8]*
- *insufficient provision for increased preparation time for teachers [8]*
- *delay in obtaining materials [8]*
- *shortage in equipment/materials/facilities [7]*

Process

- *increased workload on administrative staff [3]*
- *delay in proposal approval [3]*
- *communication among participants, role ambiguities [6]*
- *difficulties or unwillingness of teachers to change [2]*
- *inappropriate use of expertise [3]*
- *scheduling/programming arrangements [5]*

Context

- *E.O.F. constraints on funding of clerical/technical services [3]*
- *A.T.A. criticism of aide utilization [1]*
- *lack of parental support/involvement [4]*
- *inflation [1]*

Outcomes

- *unanticipated negative consequences [1]*

Discussion

1. Field office reports were available for approximately one-half of the projects.

2. There were only one or two reports of "*failure*" of project. Field office reports were almost inevitably positive.

3. The data contained in these sources coincided approximately with data obtained from interviews and site visits.

4. *Program progress*

(a) Meeting objectives

Yes	(48)
No	(10)
Unclear	(11)
No information	(7)
Partially	(12)

(b) Nature of evidence

Source

- *only field report [25]*
- *only progress report [36]*
- *both [13]*

Documented

Yes	(29)
No	(41)
[Clear	(33)
[Ambiguous	(25)

Discussion

1. Many progress reports apparently came into EOF office only in late August and September; thus, files examined in July may contain progress and/or field reports by now.

2. Documented progress was defined as description of program progress which exceeds one or two brief general statements and qualifies whatever con-

clusions are provided.

3. In a majority of cases, the progress reports indicate success. However, there were some instances where progress was not significant or where data were not available.

5. *Outcome evaluation*

(a) Evaluation reports (as of July/75)

Presented	(14)
Not presented	(74)

(b) Nature of evidence

- *teacher opinion*	*[49]*
- *administrator opinion*	*[19]*
- *parental opinion*	*[17]*
- *student opinion*	*[22]*
- *other opinion*	*[7]*
- *none*	*[20]*

(c) Opinions

Documented	[17]
Undocumented	[34]

(d) Source of opinions

Evaluation reports or progress reports

(e) *"Hard" data*

standardized tests	*[11]*	
pre-post	*[9]*	
controls	*[1]*	
teacher constructed	*[1]*	
other	*[6]*	*e.g. inventory of units developed; inventory of library books catalogued/used*
none	*[20]*	

(f) Other comments on outcome evaluation

(Numbers refer to *"Analysis of Project Documents"* sheets as identified by evaluation research team).

(f) cont'd

- *"Hard" data not presented; but inferences as to its availability provided (#12, 13, 21, 24, 25, 32, 38, 43, 51, 58, 59, 63, 64)*
- *outcome evidence not shown to be related to classroom performance (#15, 9)*
- *ambiguous "hard" data provided*
- *focus on delivery rather than outcome*
- *available tests described as not appropriate*
- *indication that original EOF guidelines broken (i.e. teacher aides handling clerical duties (#23)).*
- *self-identification of project unworkability and request to discontinue (#53)*
- *argued in favor of perceptions/observations rather than "hard" data (#33)*
- *belief statements as evaluation (#56)*
- *shift from planned "soft" evaluation to "hard" procedure (#51)*
- *isolated instance of negative critique of project by field office (#51)*
- *inappropriate statistical inference (#60)*
- *very elaborate evaluation design and report is shown by (#35)*
- *less elaborate; but fairly comprehensive design in (#50)*

Discussion

The main conclusion to be drawn from these data is that evaluation was not adequately implemented for the great majority of projects analyzed.

6. *Fulfillment of proposed evaluation design*

(a)

Complete	(19)
Incomplete	(44)
Not done at all	(10)
Unknown	(5)

6. (b) Components missing (i.e. proposed components)

- *achievement/attitude tests [24]*
- *student surveys [4]*
- *teacher surveys [6]*
- *parent surveys [8]*
- *external evaluation (usually F.O.) [6]*
- *inventory of materials used/ developed [3]*
- *record of student activity [2]*

Discussion

1. Of cases where design appears to have been fulfilled, only a few could be said to have systematic and comprehensive procedures.

2. This and other data in the files does not show any high degree of concern by the EOF office with the lack of evaluation which is well thought-out and systematically pursued.

Conclusions

[1] PROJECT PROPOSALS WERE GENERALLY ADEQUATE AND IN LINE WITH *EOF* GUIDELINES.

[2] THE *EOF* OFFICE ADMINISTERED THE GUIDELINES CONSISTENTLY.

[3] BUDGETED FUNDING FOR EVALUATION WAS EXTREMELY LOW.

[4] PROPOSALS FOR EVALUATION WERE REASONABLY WELL DEVELOPED.

[5] EVIDENCE OF PARENT AND COMMUNITY SUPPORT FOR PROPOSED PROGRAMS WAS NOT EXTENSIVE.

[6] THE RESEARCH BASIS FOR PROPOSALS WAS INADEQUATE.

[7] INTERNAL AND EXTERNAL EVALUATION REPORTS WERE GENERALLY POOR.

Chapter XI

Summary of Conclusions and Recommendations

This final chapter is comprised of two parts. First, a complete list of all of the conclusions listed at the end of each of Chapters II - X is provided. This is to provide the basis for a series of recommendations which comprise the second part of the chapter. In order to link the list of conclusions to a particular chapter, their original numbering within a chapter is retained. In the section containing the recommendations, an effort will be made to make the chain of reasoning and argument fairly clear. In some instances, the chain which links a particular recommendation to the evidence obtained in the study may not be as clear as a purely scientific strategy would call for. In those cases, the Research Director will attempt to make explicit any value judgments on his part which led to a particular recommendation.

Summary of Conclusions

Chapter II [Achievement of Intended Objectives of EOF Program]

[1] THE OBJECTIVES OF THE *EOF PROGRAM* HAVE GENERALLY BEEN ACHIEVED.

[2] MASTERY OF BASIC AND AUXILIARY SKILLS HAS BEEN MODERATELY ACHIEVED.

[3] MAINTENANCE OR INCREASE IN PUPILS' SELF-CONFIDENCE AND SELF-RESPECT HAS BEEN MODERATELY ACHIEVED.

[4] VISIBILITY OF UPGRADING ACTIVITIES IS GENERALLY LOW.

[5] THERE IS A MODERATELY STRONG CONNECTION BETWEEN PROJECT OBJECTIVES AND *EOF PROGRAM* GOALS.

[6] INSTRUCTIONAL SERVICES ARE DEFINITELY BEING DELIVERED DIRECTLY TO STUDENTS.

[7] INSTRUCTIONAL ASSISTANCE IS BEING DELIVERED TO TEACHERS.

[8] ACHIEVEMENT OF PROJECT OBJECTIVES IS NOT APPARENTLY BEING LIMITED BY VARIABLES IDENTIFIED BY THE PROJECT PARTICIPANTS OR OTHER RESPONDENTS.

[9] THE CONCEPT OF SPECIAL FUNDING DOES NOT HAVE NEGATIVE CONNOTATIONS.

[10] PARENTAL INVOLVEMENT IN *EOF* PROJECTS IS GENERALLY LOW.

Chapter III [By-Products]

[1] THERE IS FAIRLY STRONG EVIDENCE TO SUGGEST THAT *EOF* HAS PRODUCED THE FOLLOWING BY-PRODUCTS:

(a) *growth of knowledge and transferable skills of teachers.*

(b) *parental insights into the problems of educating elementary children.*

(c) *board member support for projects which would otherwise have not been supported.*

(d) *increased communication among professionals.*

(e) *improved staff and student attitudes.*

(f) *positive community reaction.*

(g) *administrative demands were worth the effort in view of the output.*

(h) *apparent stigma effect for some rural pupils.*

[2] THERE IS TENTATIVE SUPPORT FOR A CONCLUSION THAT *EOF* HAD THE FOLLOWING BY-PRODUCTS:

(a) *increased professional growth of teachers.*

(b) *increased teacher sensitivity to alternatives.*

(c) *increased teacher ability to identify individual student needs.*

(d) *increased evaluative skills of school district personnel.*

(e) *stimulated local curriculum development activities.*

Chapter IV [Success of Individual Projects]

[1] INDIVIDUAL PROJECTS SUPPORTED BY *EOF* GRANTS ARE SEEN AS GENERALLY SUCCESSFUL.

[2] THERE IS SOME DIVERSITY IN THE AMOUNT AND QUALITY OF EVALUATIVE EVIDENCE AVAILABLE TO SUPPORT THE VIEW THAT THE PROJECTS ARE EFFECTIVE.

[3] THERE WERE NO NEGATIVE RESPONSES TO THIS QUESTION (i.e. PROJECT SUCCESS?) FROM ANY OF THE PEOPLE INTERVIEWED.

Chapter V [Administrative Side-Effects]

[1] FOR SOME SUB-GROUPS, PARTICULARLY BOARD MEMBERS AND ADMINISTRATORS, THERE WAS A DISPROPORTIONATE AMOUNT OF ADMINISTRATIVE TIME USED BY *EOF* ACTIVITIES.

[2] STAFFING OF PROJECTS WAS NOT PERCEIVED TO BE A DIFFICULTY.

[3] RURAL CENTRAL OFFICE PERSONNEL REPORTED AN INCREASE IN ADMINISTRATIVE WORK LOAD.

[4] SOME ANXIETY AND CONCERN OVER ADMINISTRATIVE SIDE-EFFECTS WAS EVIDENT.

[5] CENTRAL OFFICE PEOPLE HAD SOME CONCERN ABOUT THE GUIDELINES FOR *EOF*.

[6] THERE WAS NO SUSPICION OF HIDDEN MOTIVES ON THE PART OF GOVERNMENT.

[7] RURAL PROJECT TEACHERS WERE CONCERNED ABOUT INFLATION IN COSTS, PARTICULARLY OF PAPER MATERIALS.

Chapter VI [Project versus Formula Funding]

[1] PROJECT FUNDING PROTECTS PROGRAMS FROM MANIPULATION OF BUDGETS BY ADMINISTRATION AND/OR SCHOOL BOARDS.
(N.B. Interviews with ASTA officials revealed that they felt that formula funding is preferable. Some Department of Education officials suggested that the Department should use special funding to enable it to provide leadership and then should incorporate the monies into conventional formula funding).

Chapter VII [Recommended Changes in EOF]

[1] THE GOVERNMENT SHOULD CONSIDER THE IMPLICATIONS OF MAKING THE FOLLOWING CHANGES IN *EOF* PROCEDURES:

(a) *reduce "red tape"*. (N.B. The term *"red tape"* implies *unnecessary* procedures. See the comments in the section of this chapter Observations for School Districts).

(b) *increase flexibility.*

(c) *increase the amount of money per pupil.*

(d) *provide assistance in proposal writing.* (N.B. The regional offices evidently provided a lot of assistance for proposal development in the early stages of the present EOF program).

(e) *increase lead time for similar programs in the future.*

Chapter VIII [*EOF* [COMPENSATORY]]

[1] *EOF* [COMPENSATORY] IS AT AN EARLY STAGE OF IMPLEMENTATION AND EVALUATION MUST BE QUITE TENTATIVE.

[2] THE GUIDELINES SHOULD BE RE-EXAMINED BY THE DEPARTMENT.

Chapter IX [Extension to Secondary Schools]

[1] THE GOVERNMENT SHOULD SERIOUSLY CONSIDER EXTENDING *EOF* INTO THE SECONDARY SCHOOLS.

[2] IF A SECONDARY COMPONENT IS ESTABLISHED, IT SHOULD FOCUS SOMEWHAT ON THE CONTINUANCE OF REMEDIAL PROGRAMS AS WELL AS ON UNIQUELY SECONDARY SCHOOL PROGRAM AREAS.

Chapter X [Analysis of Documents]

[1] PROJECT PROPOSALS WERE GENERALLY ADEQUATE AND IN LINE WITH *EOF* GUIDELINES.

[2] THE *EOF* OFFICE ADMINISTERED THE GUIDELINES CONSISTENTLY.

[3] BUDGETED FUNDING FOR EVALUATION WAS EXTREMELY LOW.

[4] PROPOSALS FOR EVALUATION WERE REASONABLY WELL DEVELOPED.

[5] EVIDENCE OF PARENT AND COMMUNITY SUPPORT FOR PROPOSED PROGRAMS WAS NOT EXTENSIVE.

[6] THE RESEARCH BASIS FOR PROPOSALS WAS INADEQUATE.

[7] INTERNAL AND EXTERNAL EVALUATION REPORTS WERE GENERALLY POOR.

Summation

In general, the EOF [Elementary] program has been a success. The concept of special funding for elementary school projects has been extremely well received throughout the province. Many of the administrative problems perceived by participants may be attributed to the short amount of lead time and to the lack of experience with project funding and curriculum development activities. On the face of it, the projects appeared to be successful although there was a scarcity of really solid evidence about the educational outcomes.

As a model for stimulating local activity and for focussing on elementary pupils, EOF seemed excellent. However, as part of a systematic model for improving the quality of education it was, in our opinion, deficient in several important respects. [1] It was not embedded in a short or long range planning model aimed at improving quality (e.g. *Lead time was short and there is no certainty about continuation of funding beyond three years*). [2] It was not based on research knowledge about teaching or learning or pupil needs. [3] The lack of evaluative skill and evaluative evidence provides little hope for long-term payoff in terms of future shifts in the direction of elementary schooling in Alberta.

In conclusion, while the EOF program has been a success, it smacks too much of a *"one shot"* effort. If project funding is to continue to be used, it should be incorporated into a larger framework of educational planning with a strong research and development component. It is obviously worthwhile to consider spending more money on selected projects which have a strong district or school flavor as far as pupil needs are concerned; but a more coordinated and systematic effort is needed if future funds are to have more payoff for the whole system of elementary and secondary schooling in Alberta.

Observations for School Districts

Although this report and its recommendations are directed towards the Department of Education, some observations directed towards school district personnel seem necessary. These are put forward as the evaluator's reaction to the points of view expressed by various people interviewed during the study and, in part, to the proposals documented in the EOF files. They are intended to be suggestive of areas where school districts should make improvements if the maximum possible benefits of project funding are to be realized.

[1] There was evidence of two different models of project development. One was a centralized "*top-down*" model in which most decisions were made in the school district central office. The projects developed under this model tended to be large-scale in nature. One apparent advantage of this approach was that system level problems were attacked by the programs which were eventually developed. Moreover, evaluative mechanisms tended to be more elaborate, though not necessarily more sophisticated, in these *top-down* situations. The other extreme model was a "*grass-roots*", school-based approach to project development. Here, the projects were small-scale and were, typically, not subjected to any extensive evaluation. However, they had the apparent strength of involving teachers in decision-making about the problems facing the pupils in *their* schools.

Given that the evaluation schemes which we encountered were generally not good, one could suggest to those employing a "*top-down*" approach that more access to decision-making be given to school staffs because the gains in apparent sophistication of program development and evaluation in a centralist model were not usually realized. At the same time, important skills were not being developed among teachers and principals.

[2] If the projects are to have long-term effects on the quality of education, school districts need to embed their project development in a planning model that emphasizes the following elements:

(a) *A thorough needs assessment.*

(Note: The evaluation team is not convinced that projects were based on a

careful analysis of priorities with respect to pupil needs. If project funding continues beyond 1976, this component must be strengthened).

(b) *A basis in theory and/or practice.*

(Note: The project proposals lacked a theoretical base. While this may be acceptable in the early stages of a program, there must be a more thorough consideration of this element in future programs. It is up to the school districts to improve this feature of future proposals).

(c) *A strong evaluation component.*

(Note: Our findings show that this component was not strong. While one cannot expect an overnight improvement in the capacity of school districts to conduct evaluations, some beginnings need to be made. School district administrators and school boards need to become not only more capable of conducting internal evaluations; but more accepting of their responsibilities in this realm).

[3] In a project based program, there will always be administrative demands on school districts. While these may be viewed as *"red tape"* by some people, they are part of a normal interchange between levels of government. (Note: If funds were not earmarked, much of the so-called *"red tape"* would disappear at the level of district and provincial interaction. This would in no way guarantee that it would disappear at the level of central office and school staff interaction. The evaluator is of the opinion that the administrative requirements were in harmony with the project funding concept and that school district personnel should continue, as they have done in the past three years, to improve their skills as project developers).

Recommendations

[1] CONTINUE *EOF* [ELEMENTARY] FUNDING FOR AN ADDITIONAL THREE YEAR PERIOD.

Comment

The extension of project funding for three more years is intended to enable school districts to develop the successful projects and to improve or replace projects which have not yet been successful. There is much to be learned from the projects and three years have not really been long enough to get the maximum payoff from the extensive developmental work and the resources which have already been invested in EOF projects. The internal evaluation of projects is only now being completed and time for improvement is necessary. During this proposed extension period, the EOF central office operation and the system of proposals for funding should be maintained by the Department of Education. At the same time, the evaluative and curriculum developmental skills of school district personnel can be improved and used to advantage.

[2] *EOF* [COMPENSATORY] GUIDELINES SHOULD BE REVIEWED BY THE DEPARTMENT AND PARTICULAR PROJECTS SHOULD BE SUBJECTED TO THOROUGH EXTERNAL EVALUATION.

Comment

The Department is proceeding slowly with the Compensatory component. In view of the difficulties in using evidence from other settings (e.g. the United States) to support the concept of compensatory programs, heavy emphasis should be placed on external, as well as internal, evaluation of the projects. The guidelines for access to compensatory funding should be reviewed so as to consider removal of unnecessary restrictions.

[3] AN *EOF* [SECONDARY] COMPONENT SHOULD BE INTRODUCED FOR THE *1977-78* SCHOOL YEAR AND CONTINUING UNTIL AT LEAST *1979-80*. FUNDS FOR PLANNING SHOULD BE INCLUDED IN THE BASIC GRANTS FOR THE FIRST YEAR OF OPERATION OF PROJECTS.

Comment

The operational outline for achieving this is as follows:

(a) *Announce the secondary component during 1975-76 school year.*

(b) *Encourage planning during 1976-77 by requiring proposals to be submitted, by a suitable deadline date (e.g. February, 1977), to the EOF office.*

(c) *For projects that receive approval, include with the per pupil grant for 1977-78 an additional grant for planning (e.g. $3.00 per pupil). This would be a once only grant; but would be available, over the lifetime of EOF (Secondary), for other newly approved projects during their first year of operation.*

The reason for this part of the recommendation is that lead time for project developing should be provided for any extension of the concept into other grade levels. In general, given the favorable opinions about EOF (Elementary), extension of the project concept into other grade levels seems appropriate. The only rider on this recommendation would be that such an extension of funding should in no way jeopardize the position of elementary schools.

Concluding Statement

The data contained in this report have been rather extensive. The conclusions converged toward a favorable assessment of EOF per se. Any doubts expressed by the Research Director were mainly in terms of the long-term benefits of such programs. How the Department of Education and the Government of Alberta will use the information and the recommendations, will determine, ultimately, the value of this piece of research. It must be judged in terms of its usefulness for and its effects on decision-making in Alberta.

APPENDIX 'A'

Interview Schedule

the university of alberta
Office of the Chairman
Department of Elementary Education
Edmonton, Alberta

APPENDIX 'A'
INTERVIEW SCHEDULE

School zone number: _____
School jurisdiction: _____
Name of the project: _____
Name of the school: _____
Position of the interviewee: _____

There are two basic dimensions to this interview: the first one deals with your views of EOF in terms of the *project(s)* with which you are familiar; the second one deals with your views of EOF as a *program* for the funding of projects which deliver direct instructional services to students and direct assistance to teachers throughout the province.

SECTION 'A'

The following questions are concerned with the one or more specific EOF projects with which you are *personally familiar*:

N.B. *Are you familiar with* EOF *elementary* _____, EOF *compensatory* _____, *or both* _____?

1. *What need was this project designed to satisfy?*

_____
_____
_____
_____
_____
_____

2. *How and by whom was this need identified?*

_____
_____
_____
_____
_____
_____

3(a) *Has this project met the needs for which it was designed* (i.e. *achieved its stated objectives*)? Probe for evidence.

_____
_____
_____
_____
_____
_____

3(b) *Has the EOF project been successful in delivering "direct instructional services to students and direct instructional assistance to teachers"?* (Probe for evidence).

4(a) *Has this EOF project produced any desirable or undesirable side-effects that you can think of?*

(b) More specifically:

i. *What impact has this EOF project had on student and staff attitudes?*

ii. *What skills, abilities or insights have you acquired as a result of your association with this particular EOF project?*

iii. *How has this project affected your allocation of time and energy?* (Probe for a personal reaction to this).

4(b) cont'd

iv. *What has been the reaction of the community to this specific project?*

v. *To what extent have parents been afforded the opportunity to participate in this project, and to what extent have they done so?*

SECTION 'B'

The following questions deal with your views of EOF as a *program* for the funding of projects?

5(a) *From your vantage point, to what extent has the EOF program in general, achieved its intended objectives? Please explain.*

(b) *Looking at the list of EOF objectives you have been handed, would you care to comment more specifically on the extent to which all or any of these objectives have been achieved by the EOF program?*

6. *Have you noticed any beneficial or undesirable administrative, fiscal, or other non-teaching-learning effects which have been produced at the school district level by the introduction of the EOF program?*

7(a) *In general, have you noticed any desirable or undesirable side-effects that the EOF program has produced?*

(b) More specifically, as a SUPERVISOR

i. *Have you noticed any new attitudes or approaches to curriculum development within your jurisdiction?*

ii. *Have you noticed any increase in research and evaluation design capabilities within your jurisdiction?*

iii. *Do you think the EOF program has increased the ability of personnel to generate new ideas aimed at dealing with specific educational needs of elementary students?*

iv. *Do you think EOF has upgraded the ability of the teachers involved to deal with specific educational problems of elementary children?*

v. *Have there been changes in the quality or quantity of communications within your jurisdiction?*

vi. *Has EOF affected staff utilization in any way?*

vii. Probe: *re. any specific undesirable side-effects.*

7(a) *In general, have you noticed any desirable or undesirable side-effects that the EOF program has produced?*

(b) More specifically, as a PRINCIPAL

i. *Do you think EOF has served to upgrade the ability of teachers to deal with specific educational problems of elementary students?*

ii. *Has the time and effort required of your staff and yourself by the program, been greater or less than you had anticipated Do the benefits derived from this program justify such allocations?*

iii. *Have you noticed any change in teacher or student morale as a result of participation in the EOF program?*

iv. *Has the EOF program produced significant new teacher skills that you consider desirable?*

v. *Has the program produced any change in parental involvement in education?*

(b)

7(a) *In general, have you noticed any desirable or undesirable side-effects that the EOF program has produced?*

(b) More specifically, as a PARENT

i. *Has the involvement of parents in the education of their children been significantly increased through EOF?*

ii. *On the basis of your experience, do you think that the parent role in this program has been significant?*

iii. *Have you been able to interact more readily with the teaching staff since your involvement with EOF?*

iv. *Have you gained any insight into the problems and procedures associated with the education of elementary students as a result of EOF?*

7(a) *In general, have you noticed any desirable or undesirable side-effects that the EOF program has produced?*

(b) More specifically, as a TEACHER

i. *Have you developed any specific curricular, instructional or organizational skills or abilities through EOF, that you did not previously possess?* Explain.

ii. *Do you think these skills and abilities will be of use to you in other educational situations?*

iii. *Has involvement with EOF made any difference in your attitudes toward aspects of your professional work?*

iv. *Is EOF a viable way for teachers to participate in curriculum development?* Explain.

v. *Has your experience with EOF been rewarding?* Explain.

8(a) *Which of the following methods of funding projects do you personally favour and why?*

i. (the more usual) formula financing

ii on the basis of proposals approved by the Department (as in EOF)

iii. other (please specify)

(b) *Which of these methods is, in fact, the most valuable and why?* (Probe: to establish criteria for judgment).

9. *Are there any specific changes in the EOF program, policies and procedures which would improve the quality and long-term productivity of the projects?* [e.g. criteria for approval, mechanism for approval].

10(a) *Do you think there is a need for an EOF type program at the secondary level?*

(b) [if "yes"] *Would this offset the intention of EOF to provide a more equitable allotment of funds to the elementary level, since formula financing presently favours the secondary level?*

(c) [if "yes"] *Is this an undesirable situation? Why?*

(d) [if "yes"] *What suggestions or recommendations would you make to remedy the situation?*

APPENDIX '8'

Format for Document Analysis

ANALYSIS OF PROJECT DOCUMENTS

TITLE of PROJECT: _____

I. CRITERIA ASSOCIATED WITH THE PROPOSAL

1. Small classroom project (code as per matrix): _____

2. Funding emphasis
   (a) in-service education of teachers _____
   (b) additional classroom teachers _____
   (c) non-clerical aides to support teachers _____
   (d) specialist services related to classroom teacher _____
   (e) materials for classroom teacher _____
   (f) administrative/coordinating/planning services _____
   (g) other _____

3. Rationale for program
   (a) present/absent (b) clear/ambiguous

4. Objectives for program
   (a) stated/unstated (b) general/specific (c) vague/clear

5. Description of program
   (a) consistent with objectives: *Yes/No/debatable*

6. (a) Detailed program budget: *Yes/No/debatable*
   (b) Allocation for evaluation: $_____ out of total budget of $ _____

7. Evidence provided of
   (a) parent support: *Yes/No* nature of evidence _____
   (b) teacher support: *Yes/No* nature of evidence _____
   (c) community support: *Yes/No* nature of evidence _____

8. (a) First draft of proposal received: *Approval/Conditional Approval/ More information required*
   (b) Follow-up on above: documented/undocumented
   (c) Criteria relaxed by EOF office: *Yes/No*

9. Appeals: successful/unsuccessful

10. Evaluation design components proposed:
    (a) academic achievement ____ (b) student attitude/opinion survey ____
    (c) pre-post ____ (d) teacher attitude/opinion survey ____
    (e) administrator attitude/opinion survey ____
    (f) parent attitude/opinion survey ____
    (g) other ____

II. CRITERIA ASSOCIATED WITH EVALUATION

1. Needs assessment
    (a) outcomes objectives identified (#4,1) _____
    (b) adequate description of current state: *Yes/No/can't say*
    (c) citation of research studies: *Yes/No/ambiguous*

2. Program planning
    (a) program outline (#5 & 6,1) _____
    (b) probable success of program in meeting objectives: stated/inferred/unclear
    (c) probable success of program supported by: professional judgment/ research evidence/unclear

3. Implementation process
    (a) program carried out as planned: *Yes/No/modified/unknown*
    (b) nature of evidence: PO reports/self-report/other _____
    (c) difficulties reported on (state) _____

4. Program progress
    (a) meeting objectives: *Yes/No/unclear/no information/partially*
    (b) nature of evidence: source (type/scope) _____
    (c) documented/undocumented
    clear/ambiguous
    (d) other comments _____

5. Outcome evaluation (intentions vs. outcomes)

   (a) outcome evaluation reports: presented/not presented

   (b) nature of evidence: opinions of teachers/administrators/parents/students/other

   (c) opinions: documented/undocumented

   (d) source: _____

   (e) "hard" data: standardized tests/pre-post/controls/teacher constructed tests/other _____

   (f) other comments _____

6. Fulfillment of proposed evaluation design:

   (a) complete/incomplete/not done at all

   (b) components missing (specify) _____

   (c) other comments _____